

3RD QUARTER 2015 MARKETING REPORT

Branson Convention & Visitors Bureau
November, 2015

- U.S. Economic Outlook
- U.S. Travel Performance
- Branson 3Q 2015 Performance
- Branson Visitor Update

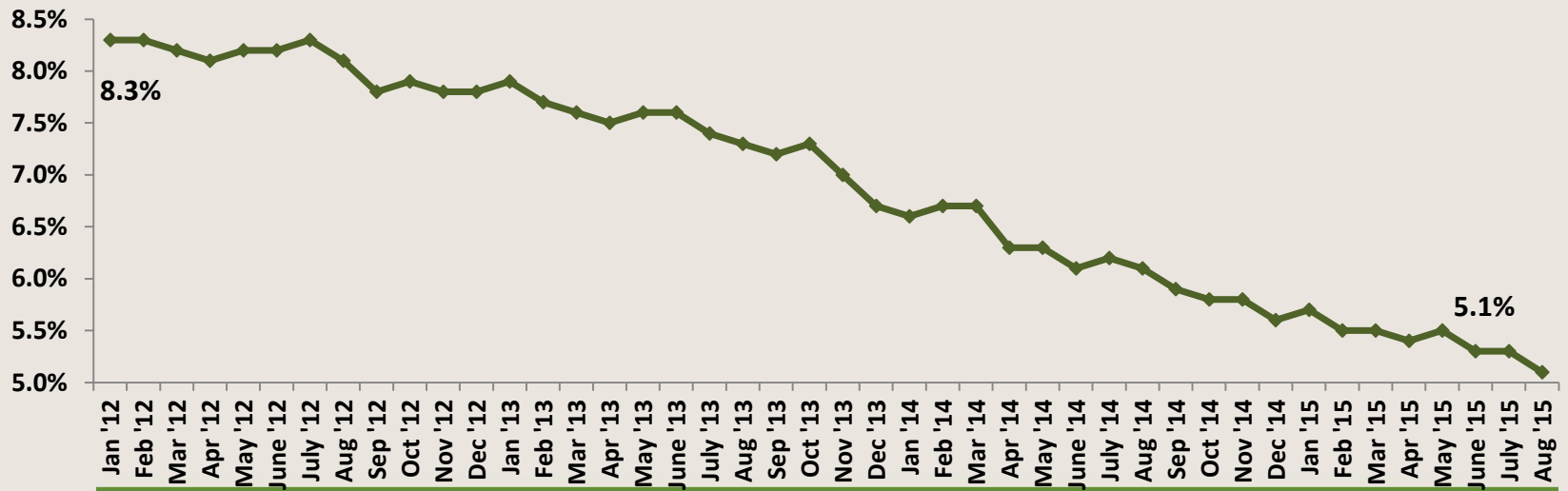
PRESENTATION OVERVIEW

ECONOMIC OUTLOOK

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF OCTOBER 23, 2015

U.S. UNEMPLOYMENT

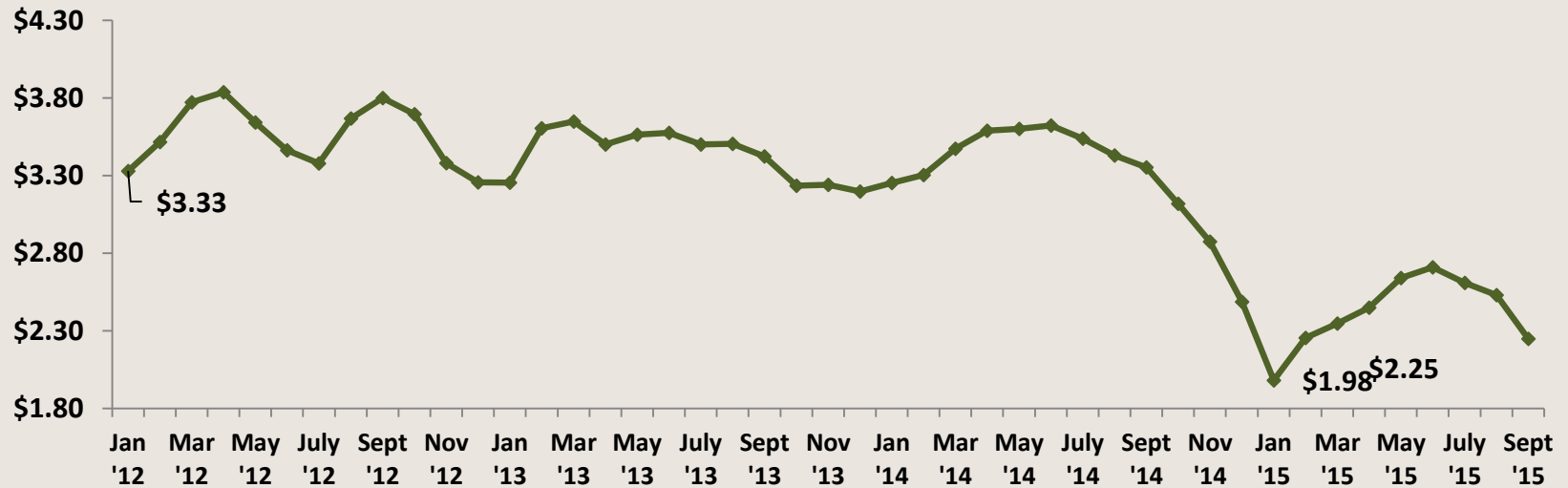
The U.S. Unemployment Rate has been trending downward since its peak in October 2009 when unemployment reached 10.2%. At 5.1% in August 2015, it was at the lowest level since April 2008 when it was 5.0%.



This year alone, unemployment has dropped from 5.7% in January to 5.1% in August.

GASOLINE PRICES

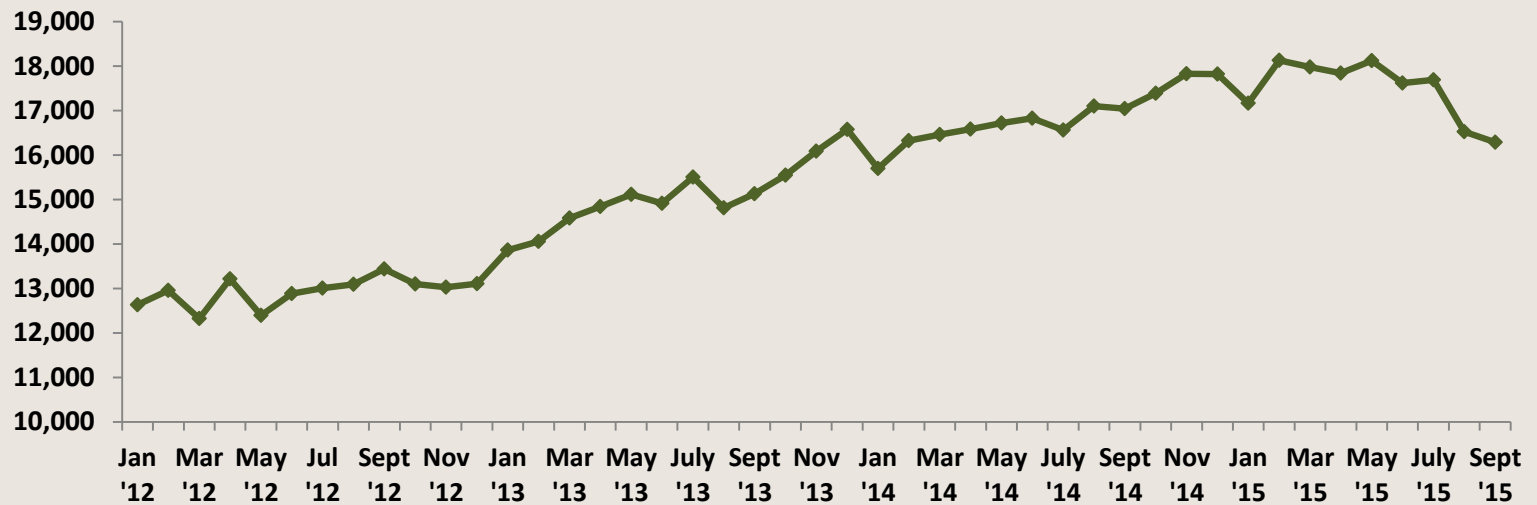
U.S. Gasoline Prices averaged \$2.25 at the end of September 2015. This is down 32% compared to the same time last year. Gasoline prices have risen \$0.27 this year increasing from \$1.98 in January to \$2.25 in September.



September gasoline prices have not been this low since July 2004 when they averaged \$1.90.

DOW JONES (DJIA)

The Dow Jones Industrial Averaged Closed at 16,285 in September 2015. This is down 4.4% compared to the same time last year. And, the DJIA has fallen 8.6% in 2015.



While the DJIA has experienced fairly sharp declines in 2015, it remains higher than it was in early 2014.

TRAVEL PERFORMANCE

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U.S. LEISURE & BUSINESS TRAVEL

According to the U.S. Travel Association, growth in leisure travel person-trips will slow in 2015 while business travel growth will pick up a little speed.

USTA estimates that leisure travel increased 2.7% in 2014 and growth will slow to +2.0% in 2015. Additionally, business travel which grew by 1.3% in 2014 is expected to grow by 1.8% this year.

U.S. ROOM DEMAND +3.0%

According to STR, U.S. room demand has increased 3.0% over the last 12 months. As the USTA has predicted, this year's growth rate is slightly slower than the lodging industry was experiencing at this time last year:

- September 2015 YTD +3.0%
- September 2014 YTD +4.3%
- September 2013 YTD +2.1%

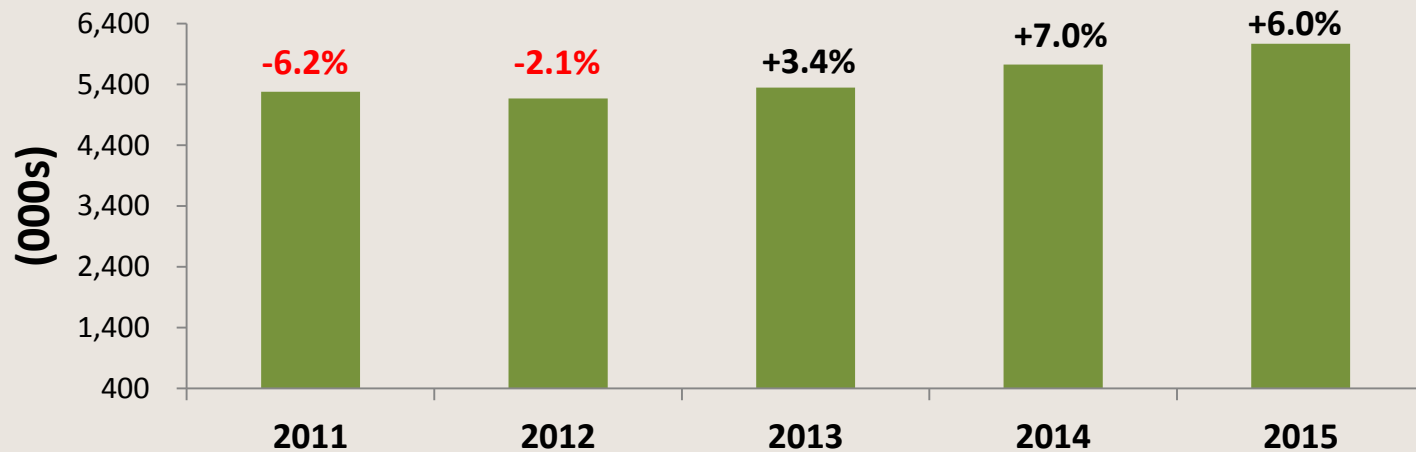
SOURCE: STR, SEPTEMBER 2015

BRANSON 3Q PERFORMANCE

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BRANSON ESTIMATED VISITATION

3rd Quarter 2015



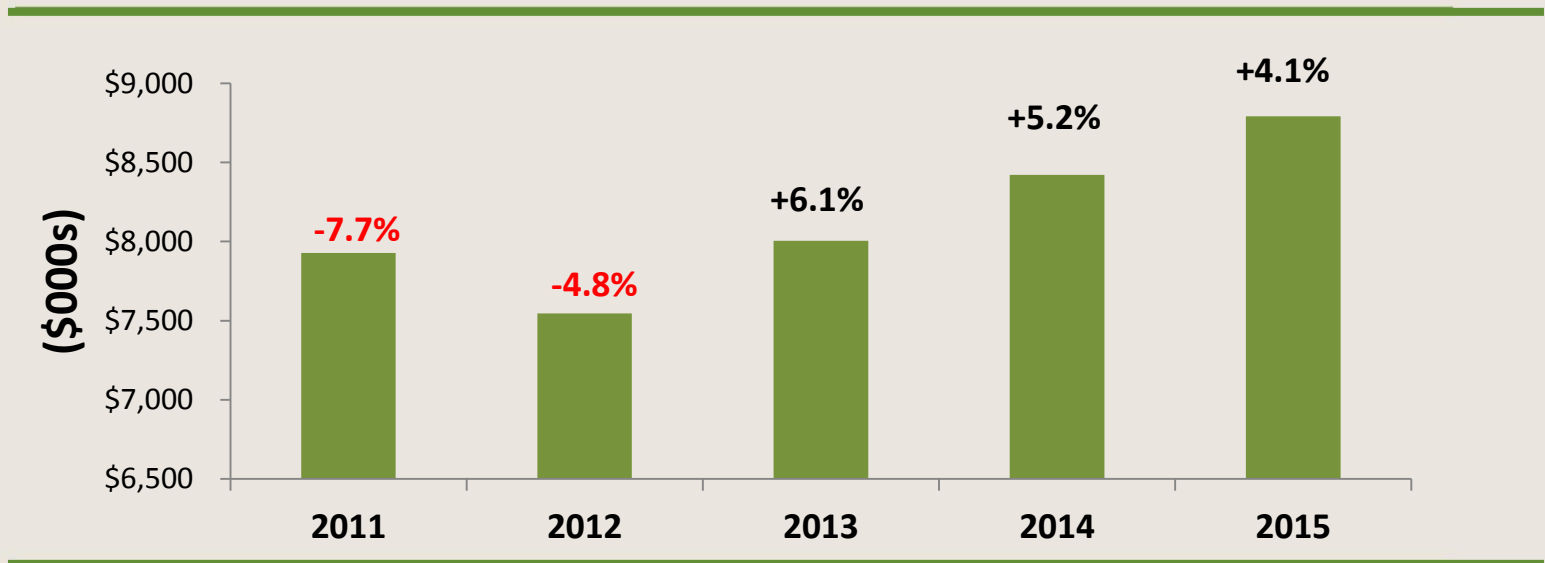
CITY OF BRANSON SALES TAX

3rd Quarter 2015



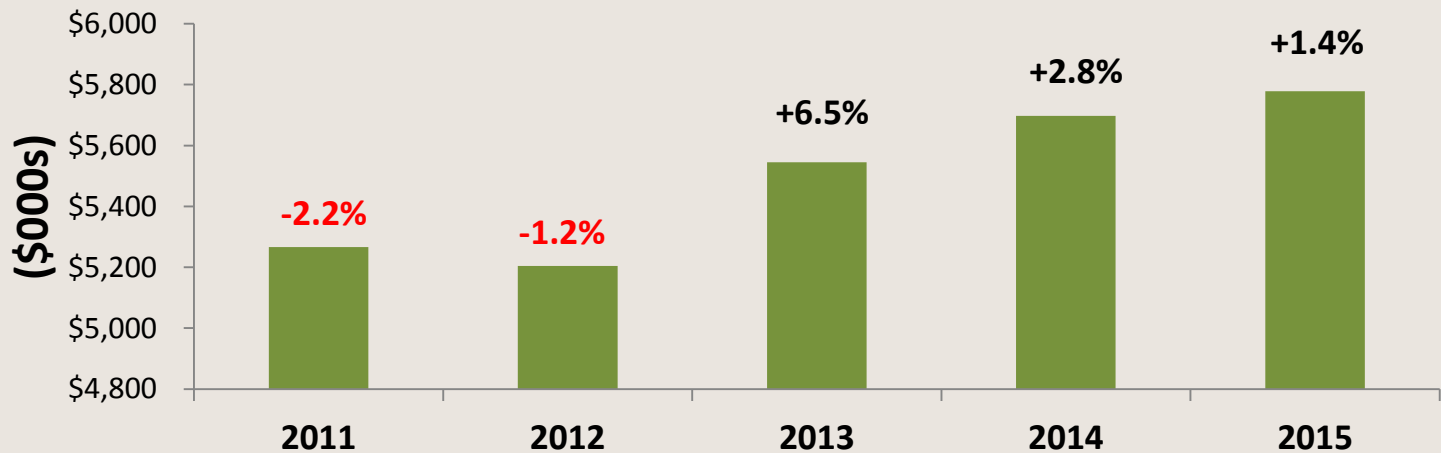
CITY OF BRANSON TOURISM TAX

3rd Quarter 2015



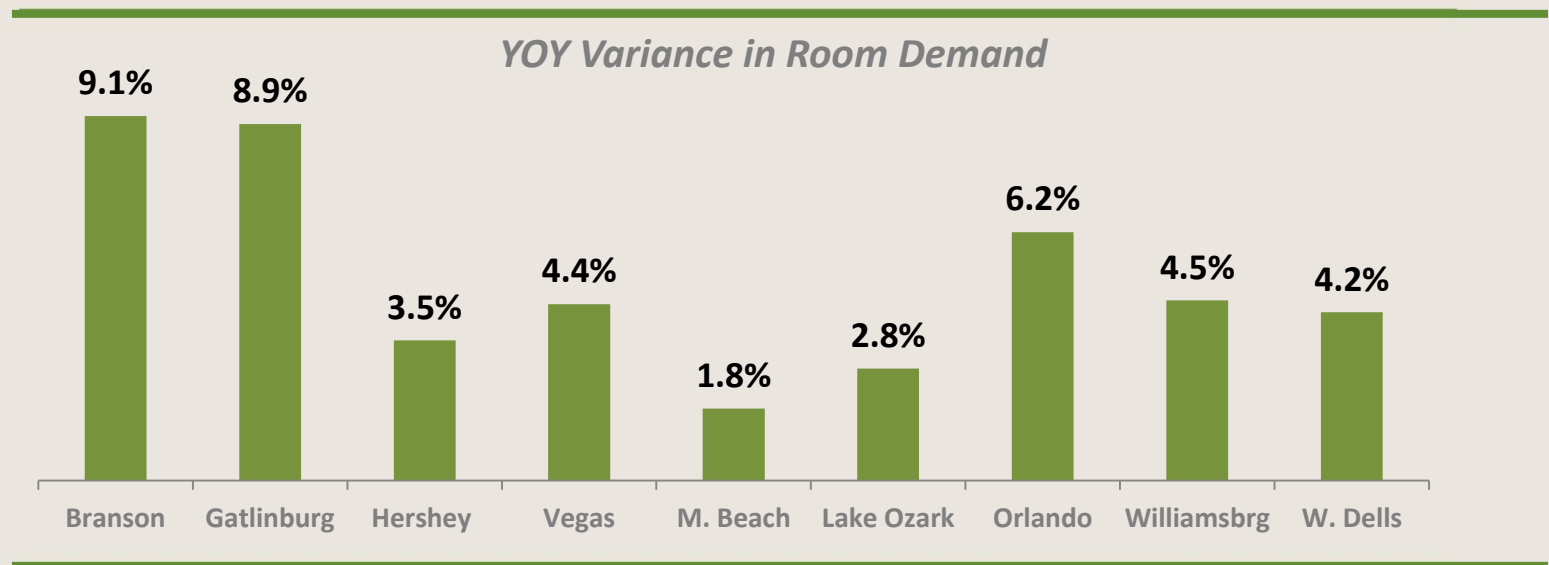
TCED TOURISM TAX

3rd Quarter 2015



ROOM DEMAND COMPARISON

3rd Quarter 2015



BRANSON VISITOR UPDATE

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YOY VISITOR TRENDS

METRIC	2015	2014	VAR
SPENDING/PARTY	\$914	\$914	\$0
FIRST-TIMERS	23%	23%	0%
% FAMILIES	43%	40%	+3%
AVG ADULT AGE	57.0 yrs	58.2 yrs	-1.2 yrs
LOS	4.1 nts	4.2 nts	-0.1 nts
% SEEING SHOWS	70%	75%	-5%
AVG # SHOWS SEEN	3.2	3.3	-0.1

SOURCE: H2R MARKET RESEARCH, SEPTEMBER 30, 2015. n = 1,471; MOE = +/- 2.6% at a 95% Confidence Interval.

VISITATION BY MARKET

METRIC	% VISITORS	VAR TO 2014
CORE MARKETS	15%	+ 9%
PRIMARY MARKETS	30%	+11%
OUTER MARKETS	28%	+15%
NATIONAL MARKETS	27%	- 7%
TOTAL	100%	+ 6%

SOURCE: H2R MARKET RESEARCH, SEPTEMBER 30, 2015

MOST INFLUENTIAL SOURCES

18%

Searched online
for a specific
business

23%

Discussed
Branson with a
friend

26%

Looked up Branson on
my computer at home

DEPARTMENT UPDATES

LEISURE GROUP SALES

- RFPS up 83% year to date – RFIs up 93% year to date.
- Hosted 11th Annual Military Reunion Planners Conference Aug. 3 – 6
- Hosted 2015 SYTA Conference Aug 27 – Sept 1.
- Hosted Kenley Konnection Group Leader FAM Sept 24 – 27.



COMMUNICATIONS/PUBLIC RELATIONS

- TripAdvisor Traveler's Choice Award Destination Winner (#15) flag and 2500 pins were distributed to frontline employees serving as a reminder for guests to post a review.
- Missouri Outdoor Communicators met here Sept. 11-13 with 60 attendees.
- Journalists in town for Fall FAM Sept. 17-20 included Arkansas Democrat-Gazette, Huffington Post, Tulsa World, NBCNews.com and more.
- 150th annual Mo. Press Assoc. convention will be held in Branson in 2016.
- At the end of 3rd quarter, Vocus/Cision/Meltwater ad equivalency values were up 26% over previous year.

SPORTS MARKETING AND DEVELOPMENT

- USSSA, FASA, B2 and Varsity Spirit Cheer & Dance camps and Starpower retuned.
- The St. Louis and Kansas City Sports Commissions hosted a meeting in Jefferson City to discuss a MO Amateur Sports Tax Credit that was approved in 2013 . The Department of Economic Development answered questions regarding the current tax credit and the group discussed concerns and suggestions for changes to improve it for future use.
- Regions Archery's first annual National Championship was hosted August 14-16 at Shepherd of the Hills. There were 189 participants ranging from youth to seniors.
- The inaugural YBN Championship was held August 19 – 22. The tournament brought the Youth Baseball Industry together by featuring multiple major Youth Baseball Organizations' 12U National Champions vying for the crown of 'true' Youth Baseball National Champion were: AABC, AAU, CABA, Dizzy Dean and NABF.

SPORTS MARKETING AND DEVELOPMENT

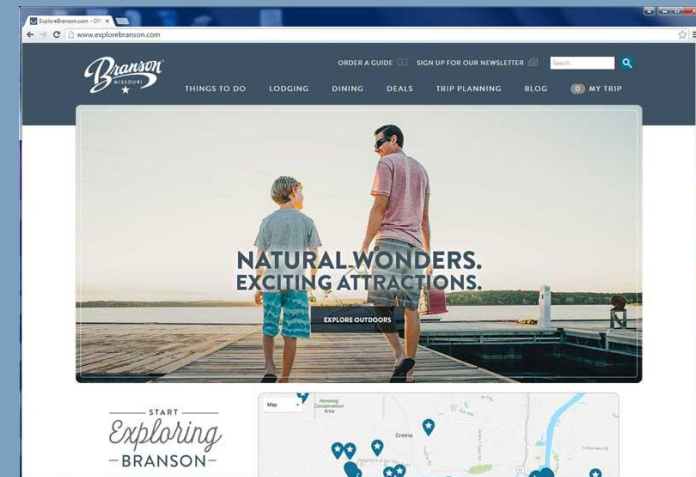
- The Branson CVB participated in a cooperative sponsorship with Show-Me MO at Collinson Media's Connect Sports Marketplace and Megan Johnson, Sales Manager at the Branson Convention Center joined the BCVB.
- FLW, the world's largest tournament-fishing organization announced their 2016 Rayovac FLW Series schedule which includes the FLW Rayovac Series Championship to be held on Table Rock Lake November 3-5, 2016.
- The Golf council met at the Branson CVB to discuss ideas for increasing recognition of golf in the Branson area.
- Terra attended the National Association of Sports Commissions (NASC) market segment meetings in Colorado Springs.



Lead Summary	3 rd Quarter		
	SA	RFPs	Total
SPORTS	101	8	109

WEBSITE AND INTERNET MARKETING

- Beginning in July, we made a number of SEO and content-related changes on ExploreBranson.com with the goal of further improving organic traffic.
- In August, development began on the reskinned ExploreBranson.com, which will update the site to match the new creative campaign that's rolling out in 2016. The new look will launch in November.
- Our digital partners met with us in Branson in September to plan for 2016 goals and budgets.



SOCIAL MEDIA AND CONTENT

- Completed the Branson Stories Summer Photo Social Campaign with:
 - 2,828 photo submissions
 - 18,452 website clicks
 - 2,947,083 ad impressions
 - 132,764 video views
- Launched the @ExploreBranson Periscope account in August.
- Hosted the #BransonFall Twitter Party on September 8th with 81 users and received 1,069,456 impressions.

- Winning Branson Stories contest photo: @dagawa



MEETINGS & CONVENTIONS

- Distributed 47 meeting RFPs into the community – 23 groups booked definite representing 3,345 room nights.
- Hosted or assisted with 7 meeting planner site inspections.
- Sponsored a luncheon at Connect Marketplace – a top industry event. Showcased our new #notyourgrandmasbranson video to 700 meeting planners and sports organizers.
- Hosted a client event at the Crystal Bridges Museum. 13 corporate planners attended including planners from Wal-Mart, Pepsico, Harp Foods and 3M.
- Hosted the Missouri Society of Association Executives (MSAE)Board Retreat in Branson and sponsored a hole at the MSAE Fun Fest Golf Tournament.

Questions?

THANK
YOU